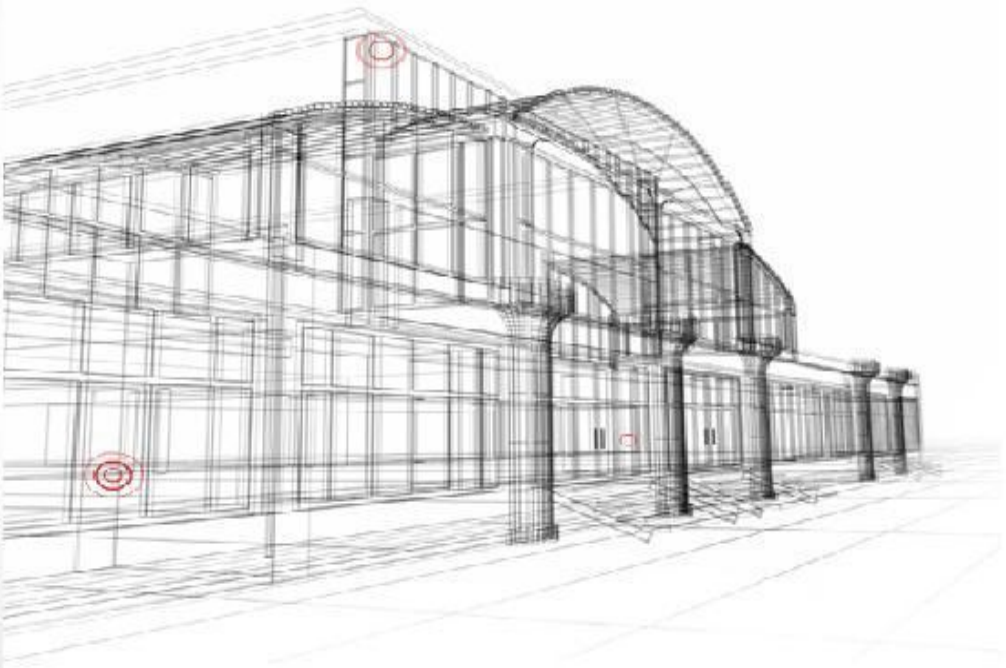
ATEC
SYSTEMS & TECHNOLOGIES



# eStatePortal User Manual Book

## Table of Contents

1. User's access pages: 4
1.1. Login. 4
1.2. Estate. 5
How to "Edit your own profile"? 6
How to "View own profile"? 6
1.3. Document Repository categories. 7
How to "Use Document Repository"? 7
How to view documents to "Estate Public"? 8
How to view documents to "Users"? 8
How to view documents to "Estate Private"? 9
1.4. Create helpdesk categories. 10
How to "log a ticket"? 11
How to "View logged tickets"? 11
How to "View my tickets (TODO)"? 12
How to "View pending tickets"? 12
How to "View Closed tickets"? 13
How to "View Accepted tickets"? 13
1.5. Reports. 14
How to "Create a Helpdesk Reports"? 14
1.6. Communication. 16
How to use "Email"? 17
How to"Attach document to an Email"? 17
How to use "SMS"? 18
How to "manage group option to send Email/SMS"? 19

How to “Add people to Email/SMS group”? ..... 19
How to “Create a new group”? ..... 20
How to “View people under a certain group”? ..... 20
How to “Edit a group category”? ..... 21
How to “Remove a group”? ..... 21
How to “View latest news”? ..... 22
How to “View News Archives”? ..... 22
How to “View a poll”? ..... 23
1.7. Lifestyle. ..... 24
How to use “Gallery option”? ..... 24
How to “View Estate album”? ..... 25
1.8. Business ..... 26
How to “View business profile”? ..... 27
How to “Edit business profile”? ..... 27
How to “create terms and conditions”? ..... 28
How to “manage representatives”? ..... 28
How to “add more services”? ..... 29
How to “activate services”? ..... 30
1.9. Downloads. ..... 31
How to “Download downloadable software”? ..... 32

# 1. User's access pages:

## 1.1. Login.

The user can login to the following sites:

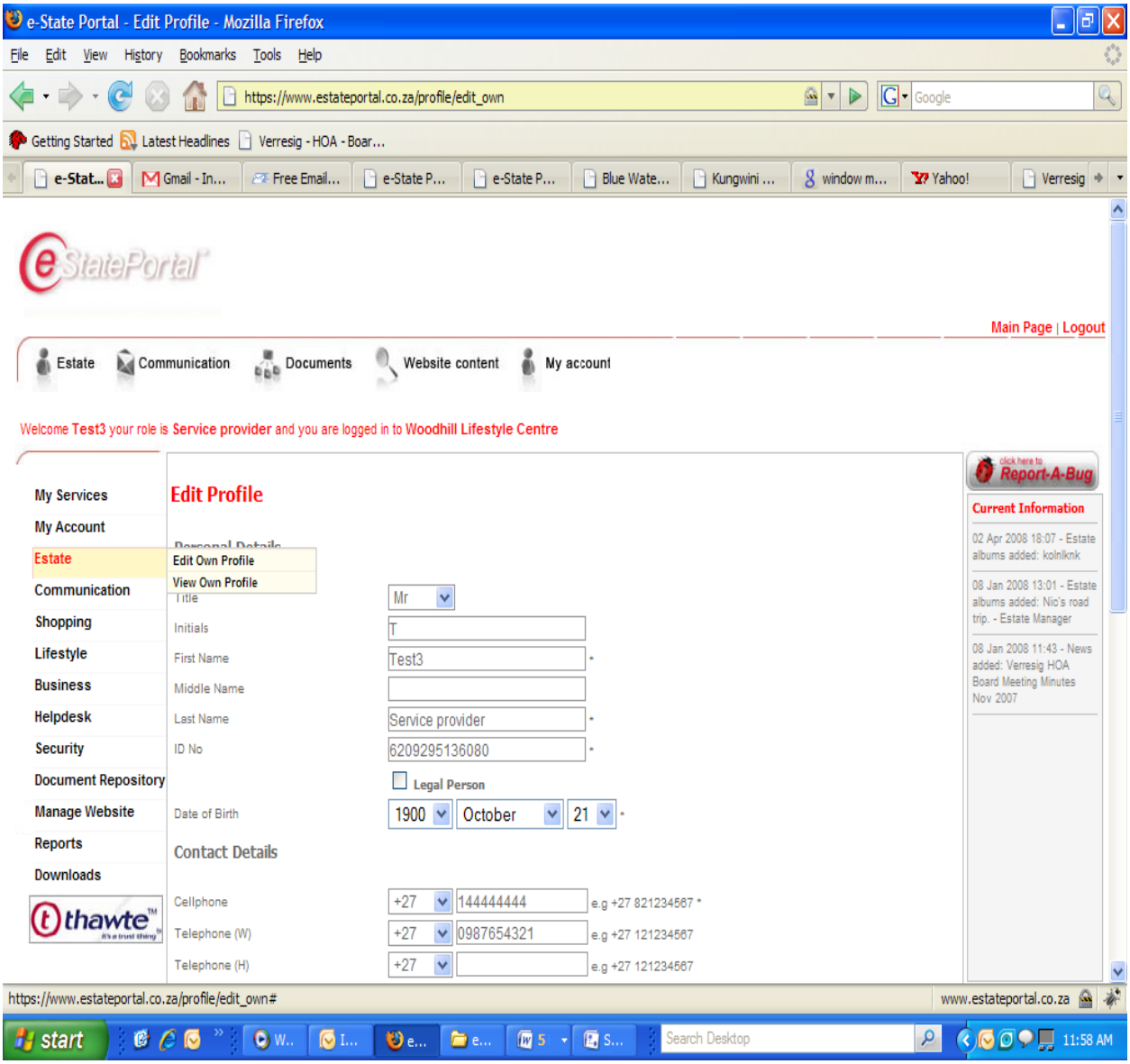
- **www.KWA.co.za**
- **www.Verrisig.co.za**
- **www.eStatePortal.co.za**

When you login into one of the website you will see the homepage. Enter the username and password and submit the information. If your information is correct the system will display eStatePortal user application interface. If your information is incorrect the error message will be displayed.

Apply for being a Service provider

To apply for being Service Provider, you click "SP Application" button in eStatePortal user interface and fill the provided form.

## 1.2. Estate.


e-State Portal - Edit Profile - Mozilla Firefox
File Edit View History Bookmarks Tools Help
https://www.estateportal.co.za/profile/edit_own
Main Page | Logout
Estate
Communication
Documents
Website content
My account
Welcome Test3 your role is Service provider and you are logged in to Woodhill Lifestyle Centre
My Services
My Account
Estate
Communication
Shopping
Lifestyle
Business
Helpdesk
Security
Document Repository
Manage Website
Reports
Downloads
Edit Own Profile
View Own Profile
Edit Profile
Title
Mr
Initials
T
First Name
Test3
Middle Name
Last Name
Service provider
ID No
6209295136080
Legal Person
Date of Birth
1900
October
21
Contact Details
Cellphone
+27
144444444
e.g +27 821234567
Telephone (W)
+27
0987654321
e.g +27 121234567
Telephone (H)
+27
e.g +27 121234567
Report-A-Bug
Current Information
02 Apr 2008 18:07 - Estate albums added: kolnlknk
08 Jan 2008 13:01 - Estate albums added: Nic's road trip. - Estate Manager
08 Jan 2008 11:43 - News added: Verresig HOA Board Meeting Minutes Nov 2007
https://www.estateportal.co.za/profile/edit_own#
www.estateportal.co.za
start
Search Desktop
11:58 AM

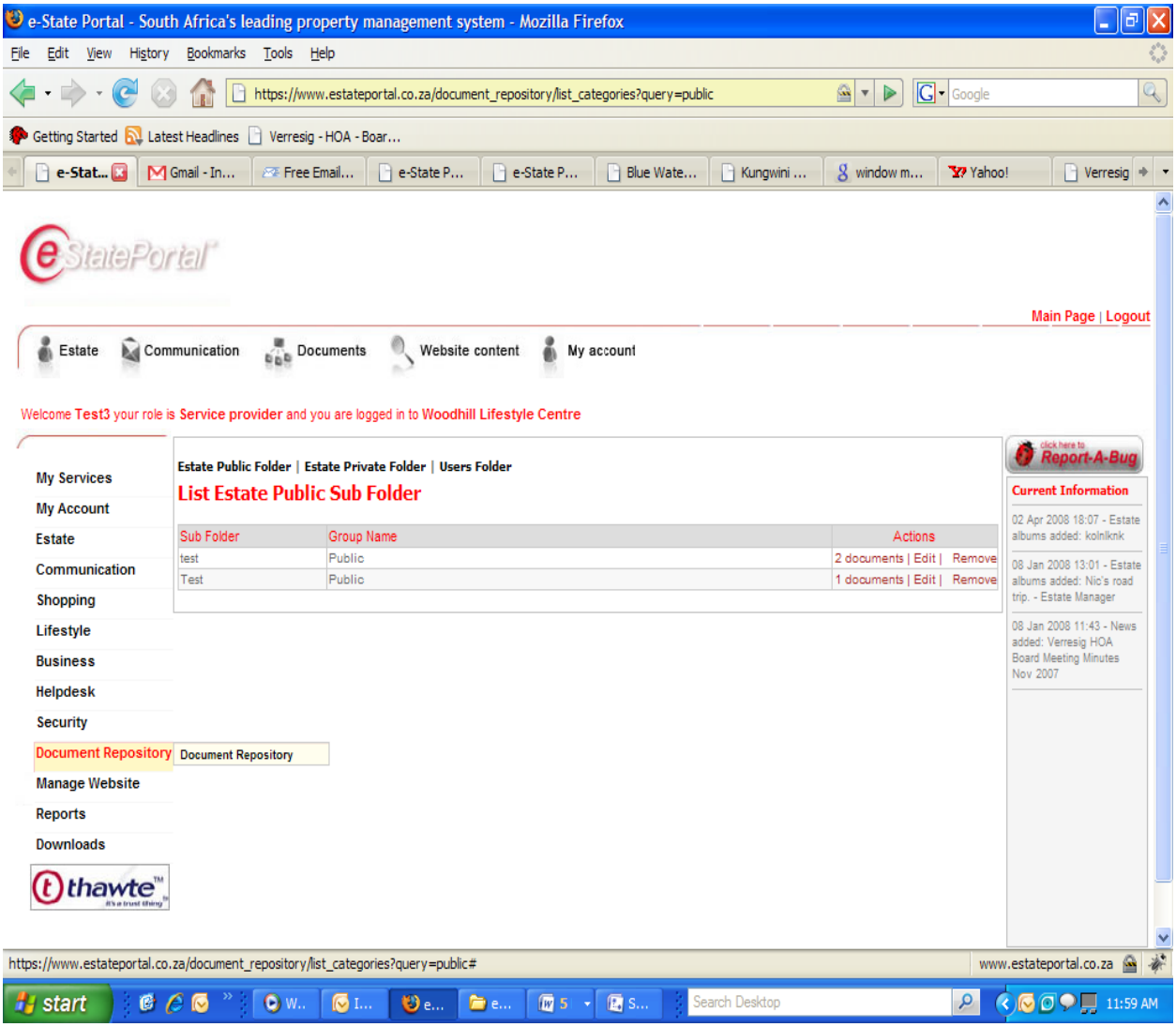
## How to “Edit your own profile”?

| *Steps* | *Actions* |
|---|---|
| 1 | Make sure that you are already login into the system |
| 2 | Select “estate” menu from the menu list. |
| 3 | Select “Edit own profile” from the sub menu list. |
| 4 | Edit the information |
| 5 | Press “Save changes” to submit the updated information. |

## How to “View own profile”?

| *Steps* | *Actions* |
|---|---|
| 1 | Make sure that you are already login into the system |
| 2 | Select “estate” menu from the menu list. |
| 3 | Select “View own profile” from the sub menu list. |

## 1.3.Document Repository categories.




---

### How to "Use Document Repository"?

| *Steps* | *Actions* |
|---|---|
| 1 | Make sure that you are already login into the system. |

| | |
|---|---|
| 2 | Select “estate” that you will create categories for from “estate quick login”. |
| 3 | Select “document” menu from the menu. |
| 4 | Select “Document repository” from sub menu list. |

## How to view documents to “Estate Public”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Click the documents option on actions next to the category you want to view. |
| 2 | Click “view document” next to the document name you want to view. |

## How to view documents to “Users”?

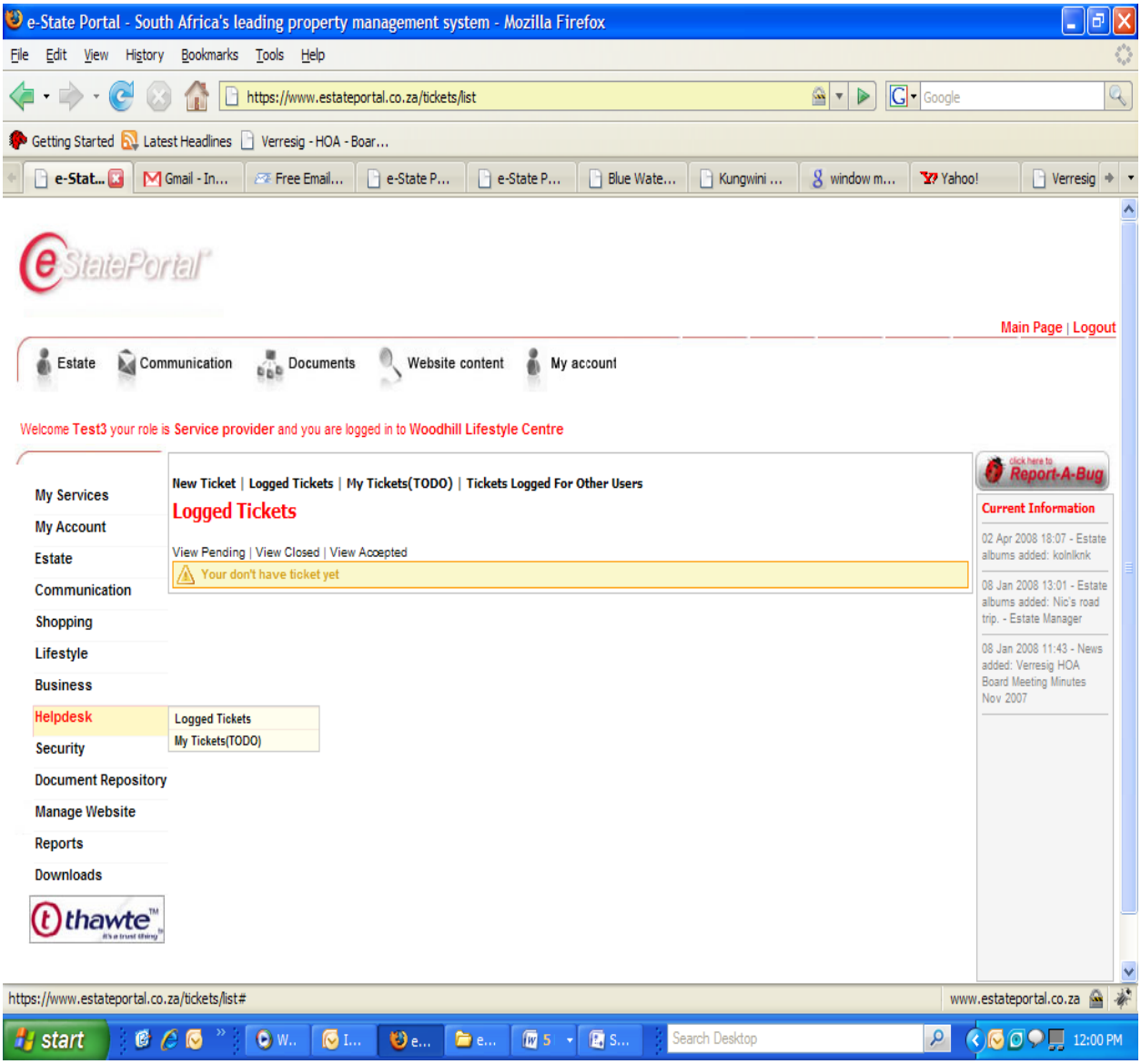
| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Click the documents option on actions next to the category |

| | |
|---|---|
| | you want to view. |
| 2 | Click “view document” next to the document name you want to view. |

## How to view documents to “Estate Private”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Click the documents option on actions next to the category you want to view. |
| 2 | Click “view document” next to the document name you want to view. |

## 1.4. Create helpdesk categories.



## How to “log a ticket”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Helpdesk menu. |
| 2 | Select “logged tickets” from the sub menu list. |
| 3 | Select New tickets to the top left side of the page. |
| 4 | Type the subject of the ticket. |
| 5 | Type the description of the ticket. |
| 6 | Select the priority of the ticket. |
| 7 | Select a category from helpdesk categories. |
| 8 | Select the status of the ticket. |
| 9 | Press “Submit” to submit the information. |

## How to “View logged tickets”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Helpdesk menu. |

| | |
|---|---|
| 2 | Select “All Tickets” from the sub menu list. |

## How to “View my tickets (TODO)”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Go to Helpdesk menu. |
| 2 | Select “View my tickets (TODO)” from the sub menu list. |

## How to “View pending tickets”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Go to Helpdesk menu. |
| 2 | Select “View pending” from the sub menu list. |

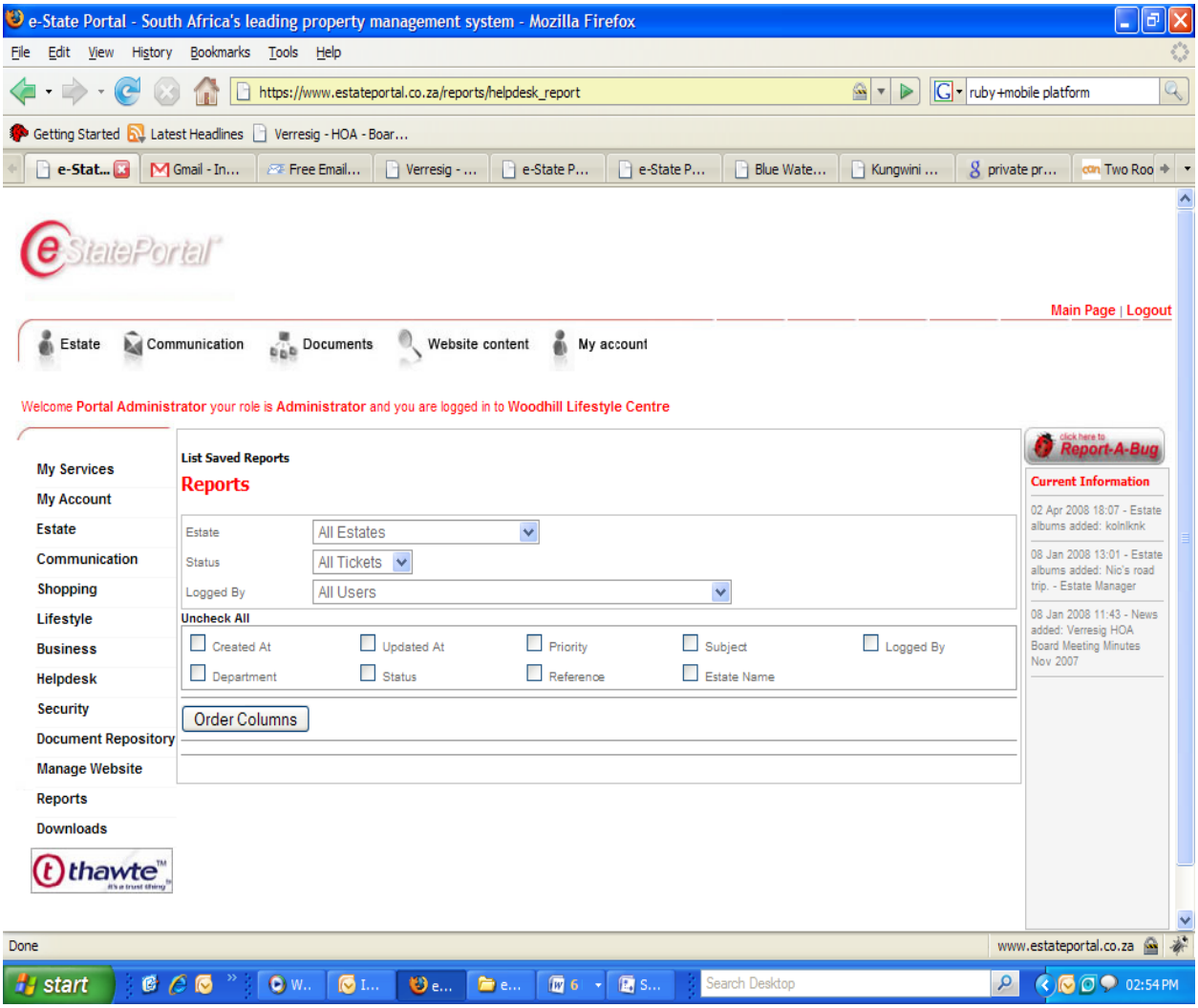
## How to “View Closed tickets”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Helpdesk menu. |
| 2 | Select “View closed” from the sub menu list. |

## How to “View Accepted tickets”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Helpdesk menu. |
| 2 | Select “View accepted” from the sub menu list. |

## 1.5. Reports.

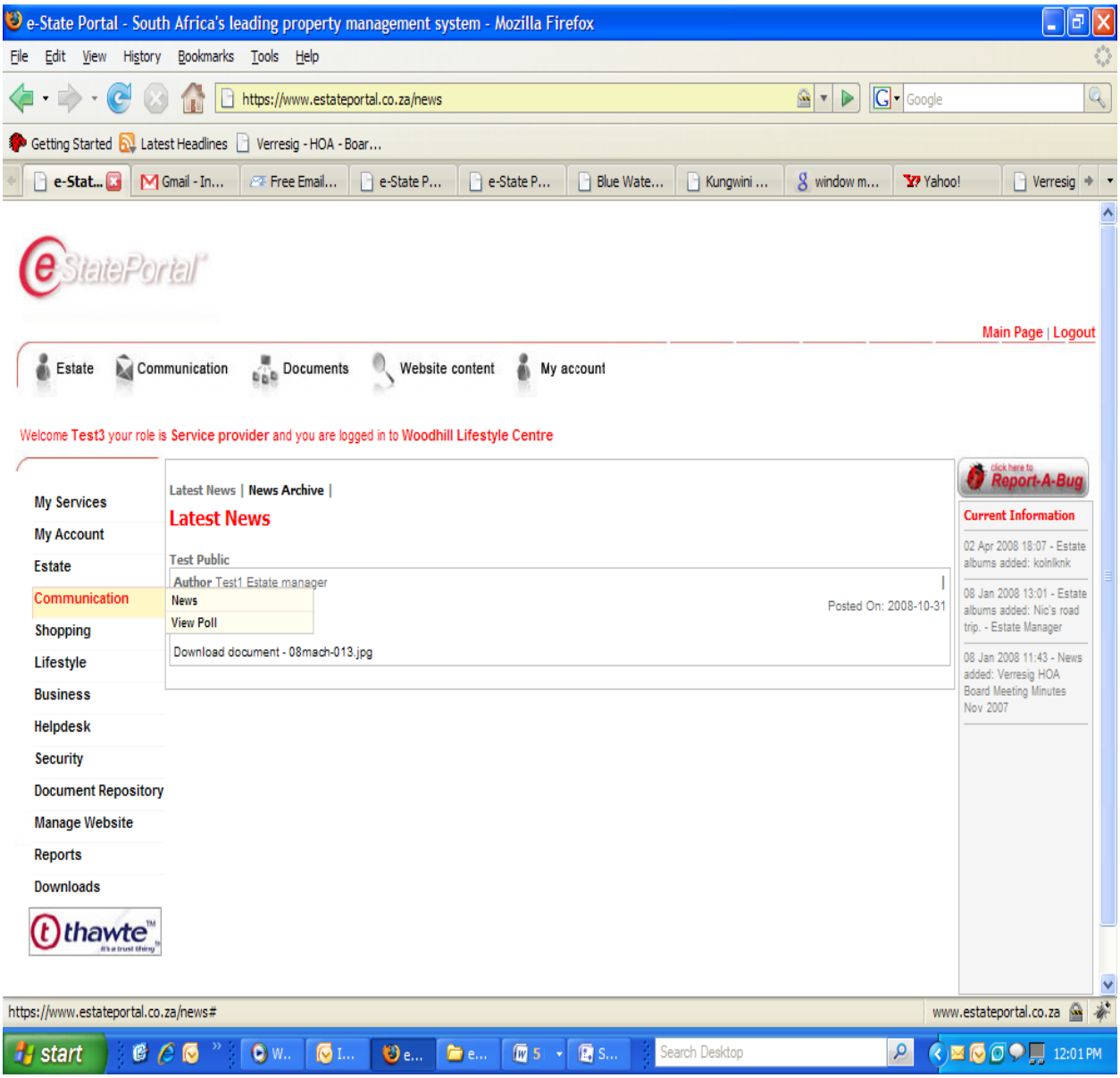



### How to "Create a Helpdesk Reports"?

| *Steps* | *Actions* |
|---|---|
| 1 | Make sure that you are already login into the system |

| | |
|---|---|
| 2 | Select “estate” that you will create the stand to from “Quick login” |
| 3 | Select “reports” menu from menu list. |
| 4 | Select “Helpdesk Reports” from the sub menu list. |
| 5 | Select “Generate New Report”. |
| 6 | Select current estate/estate you want to t generate a report for from estate dropdown list box. |
| 7 | Check all the fields you want your report to display. |
| 8 | Select the order of your columns of your report. |
| 9 | Generate your report. |

## 1.6. Communication.


e-State Portal - South Africa's leading property management system - Mozilla Firefox
File Edit View History Bookmarks Tools Help
https://www.estateportal.co.za/news
Getting Started Latest Headlines Verresig - HOA - Boar...
e-Stat... Gmail - In... Free Email... e-State P... e-State P... Blue Wate... Kungwini ... window m... Yahoo! Verresig
eStatePortal
Main Page | Logout
Estate Communication Documents Website content My account
Welcome Test3 your role is Service provider and you are logged in to Woodhill Lifestyle Centre
My Services
My Account
Estate
Communication
Shopping
Lifestyle
Business
Helpdesk
Security
Document Repository
Manage Website
Reports
Downloads
thawte
Latest News | News Archive |
Latest News
Test Public
Author Test1 Estate manager
News
View Poll
Posted On: 2008-10-31
Download document - 08mach-013.jpg
Report-A-Bug
Current Information
02 Apr 2008 18:07 - Estate albums added: kolnlknk
08 Jan 2008 13:01 - Estate albums added: Nic's road trip. - Estate Manager
08 Jan 2008 11:43 - News added: Verresig HOA Board Meeting Minutes Nov 2007
https://www.estateportal.co.za/news#
www.estateportal.co.za
start
Search Desktop
12:01 PM

## How to use “Email”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email” option from the sub menu list |
| 3 | Select group type e.g “Custom group/individual group” |
| 4 | Type subject. |
| 5 | Type message. |
| 6 | Press “Submit’ to submit the information. |

## How to”Attach document to an Email”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email” option from the sub menu list. |
| 3 | If the document is not created yet, first you need to click the link to go and create the document in the document repository. |
| 4 | Select group type (e.g “Custom group/individual group”) |

| | |
|---|---|
| 5 | Type subject. |
| 6 | Type message. |
| 7 | Click “Add attachment”. |
| 8 | Select the category. |
| 9 | Select the category subfolder. |
| 10 | Check the documents you want to attach to the email |
| 11 | Press “Submit’ to submit the information. |

## How to use “SMS”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “SMS” option from the sub menu list. |
| 3 | Select group type e.g “Custom group/individual group” |
| 4 | Type subject. |
| 5 | Type message. |
| 6 | Press “Submit’ to submit the information. |

## How to "manage group option to send Email/SMS"?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select "Email/SMS" option from the sub menu list. |
| 3 | Manage group from the top left of the page. |

## How to "Add people to Email/SMS group"?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select "Email/SMS" option from the sub menu list. |
| 3 | Select "Manage Groups" from the top left of the page. |
| 4 | Select "Add people" from the right hand side of the Manage Groups page. |
| 5 | Select the people you want to add to the group |
| 6 | Press "Submit' to submit the information. |

## How to “Create a new group”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email/SMS” option from the sub menu list. |
| 3 | Select “Manage Groups” from the top left of the page. |
| 4 | Select “New Group” from the Manage Groups page. |
| 5 | Type new group name |
| 6 | Press “Create” to create the new group name. |

## How to “View people under a certain group”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email/SMS” option from the sub menu list. |
| 3 | Select “Manage Groups” from the top left of the page. |
| 4 | Select “View” from group category in the right hand side of the Manage Groups page. |

## How to “Edit a group category”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email/SMS” option from the sub menu list. |
| 3 | Select “Manage Groups” from the top left of the page. |
| 4 | Select “Edit” from group category in the right hand side of the Manage Groups page. |
| 5 | Type the new name of the group category. |
| | Press “Update” to submit the new change. |

## How to “Remove a group”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “Email/SMS” option from the sub menu list. |
| 3 | Select “Manage Groups” from the top left of the page. |
| 4 | Select “Remove” from group category in the right hand side of the Manage Groups page. |

| | |
|---|---|
| 5 | Press “OK” to confirm the removing of group category. |

## How to “View latest news”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “News” option from the sub menu list. |
| 3 | Click “Latest news” at the top of news page. |

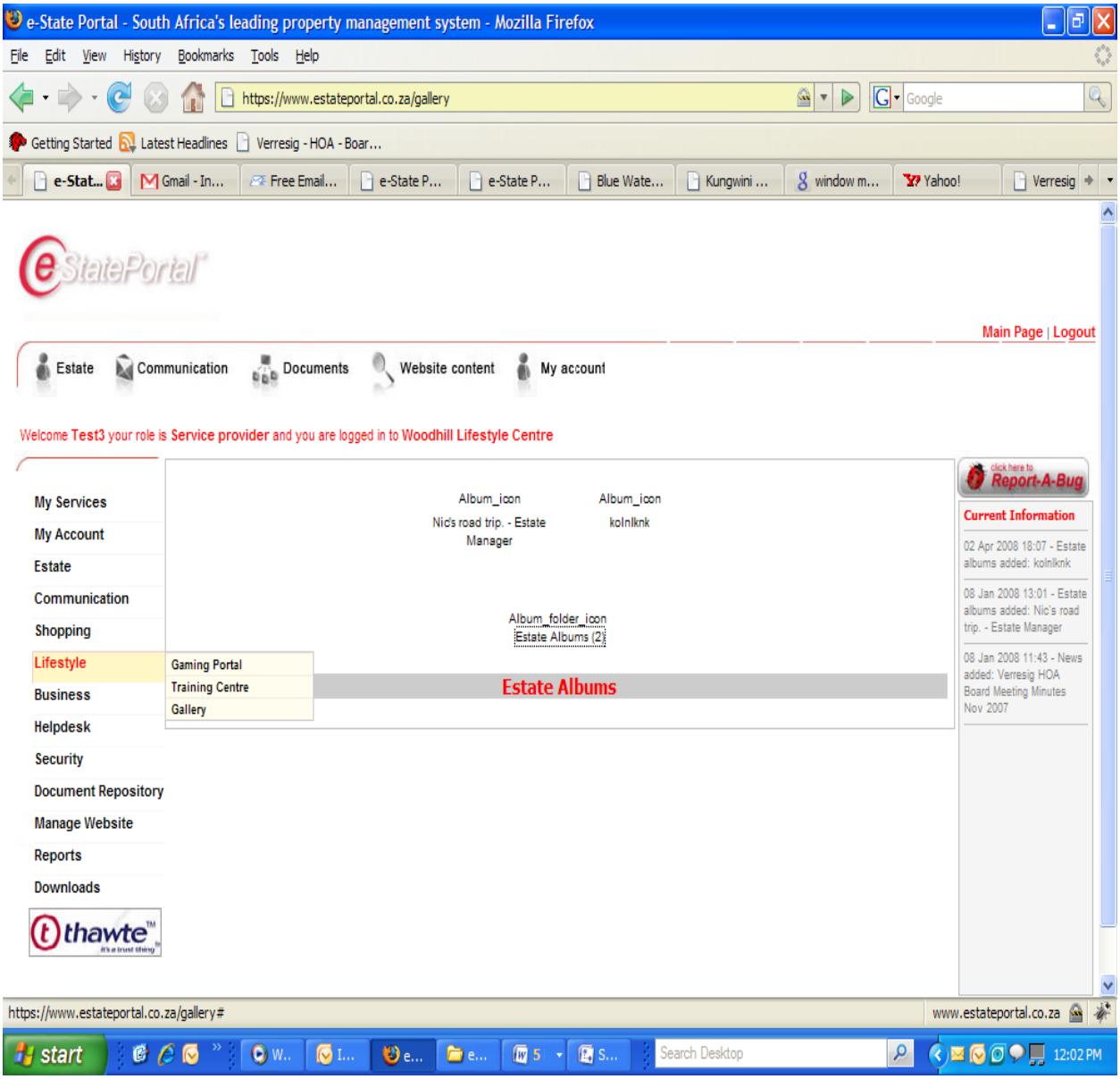
## How to “View News Archives”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “News” option from the sub menu list. |
| 3 | Click “News Archive” at the top of news page. |

## How to “View a poll”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Communication menu |
| 2 | Select “View Poll” option from the sub menu list. |

## 1.7. Lifestyle.



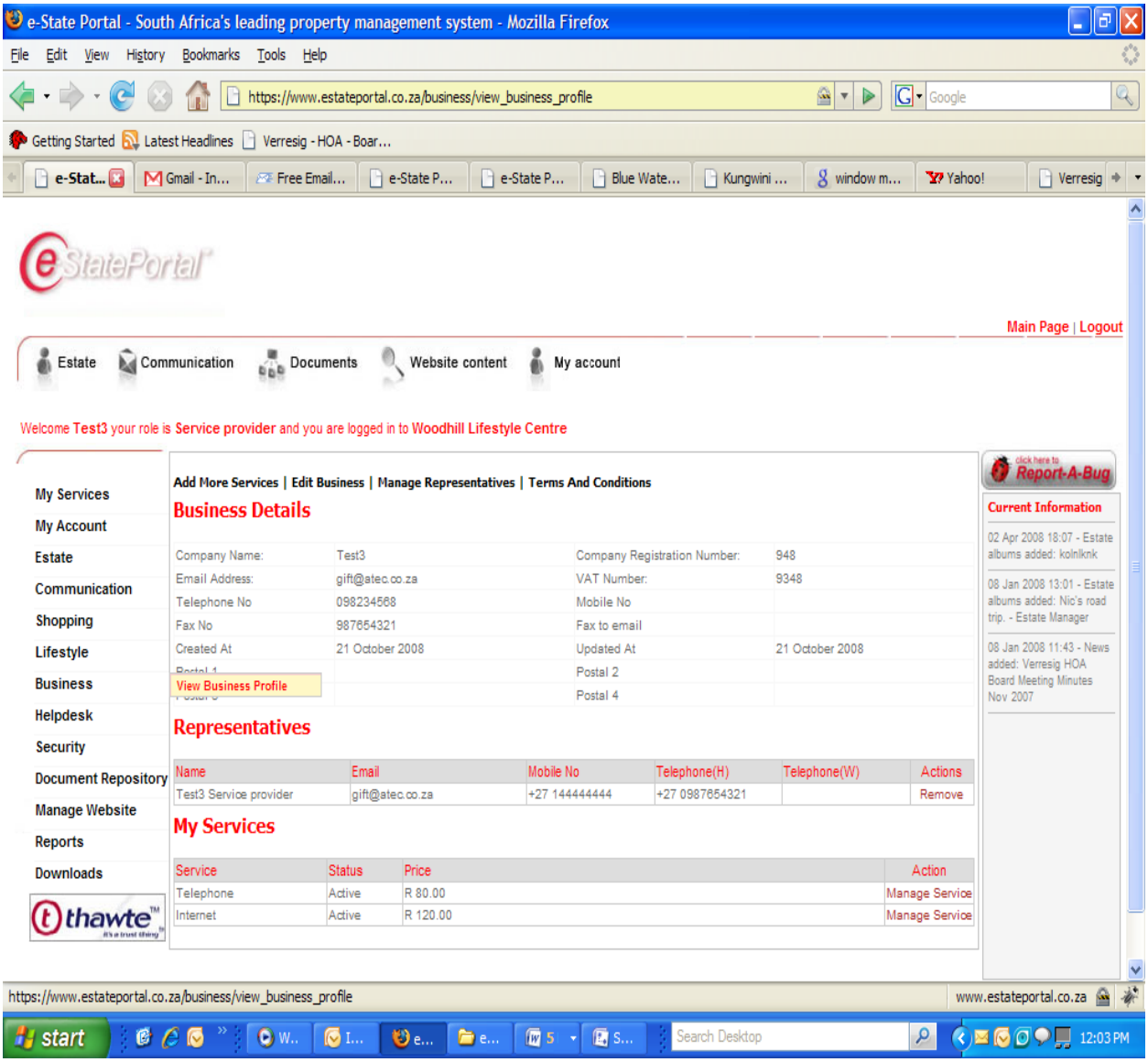

**How to use "Gallery option"?**

| Steps | Actions |
|---|---|
| 1 | Go to Lifestyle menu. |
| 2 | Select “Gallery” option from the sub menu list. |

## How to “View Estate album”?

| Steps | Actions |
|---|---|
| 1 | Go to Lifestyle menu. |
| 2 | Select “Gallery” option from the sub menu list. |
| 3 | Select “Estate albums”. |
| 4 | Double click the album you want to view. |

## 1.8. Business.


e-State Portal - South Africa's leading property management system - Mozilla Firefox
https://www.estateportal.co.za/business/view_business_profile
Main Page | Logout
Estate
Communication
Documents
Website content
My account
Welcome Test3 your role is Service provider and you are logged in to Woodhill Lifestyle Centre
My Services
My Account
Estate
Communication
Shopping
Lifestyle
Business
Helpdesk
Security
Document Repository
Manage Website
Reports
Downloads
Add More Services | Edit Business | Manage Representatives | Terms And Conditions
Business Details
Company Name: Test3
Company Registration Number: 948
Email Address: gift@atec.co.za
VAT Number: 9348
Telephone No 098234568
Mobile No
Fax No 987654321
Fax to email
Created At 21 October 2008
Updated At 21 October 2008
View Business Profile
Postal 2
Postal 4
Representatives
Name
Email
Mobile No
Telephone(H)
Telephone(W)
Actions
Test3 Service provider
gift@atec.co.za
+27 144444444
+27 0987654321
Remove
My Services
Service
Status
Price
Action
Telephone
Active
R 80.00
Manage Service
Internet
Active
R 120.00
Manage Service
Report-A-Bug
Current Information
02 Apr 2008 18:07 - Estate albums added: kolnlknk
08 Jan 2008 13:01 - Estate albums added: Nic's road trip. - Estate Manager
08 Jan 2008 11:43 - News added: Verresig HOA Board Meeting Minutes Nov 2007
https://www.estateportal.co.za/business/view_business_profile
www.estateportal.co.za
start
Search Desktop
12:03 PM

## How to "View business profile"?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to business menu. |
| 2 | Select "View Business Profile" option from the sub menu list. |

## How to "Edit business profile"?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Business menu. |
| 2 | Select "View Business Profile" option from the sub menu list. |
| 3 | Click "Edit Business" at the top menus of view business profile page. |
| 4 | Edit the information you want to edit. |
| 5 | Press "Update" to update the information. |

## How to “create terms and conditions”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Business menu. |
| 2 | Select “View Business Profile” option from the sub menu list. |
| 3 | Click “Terms and conditions” from the top of view business profile page. |
| 4 | Enter terms and conditions to the text box. |
| 5 | Click “update” to submit the information.. |

## How to “manage representatives”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Business menu. |
| 2 | Select “View Business Profile” option from the sub menu list. |
| 3 | Click “Manage Representatives” option at the top menu of view business profile page. |

| | |
|---|---|
| 4 | Select a user you want to be the representative of the business from manage users page. |
| 5 | Press “Submit” to submit the information. |

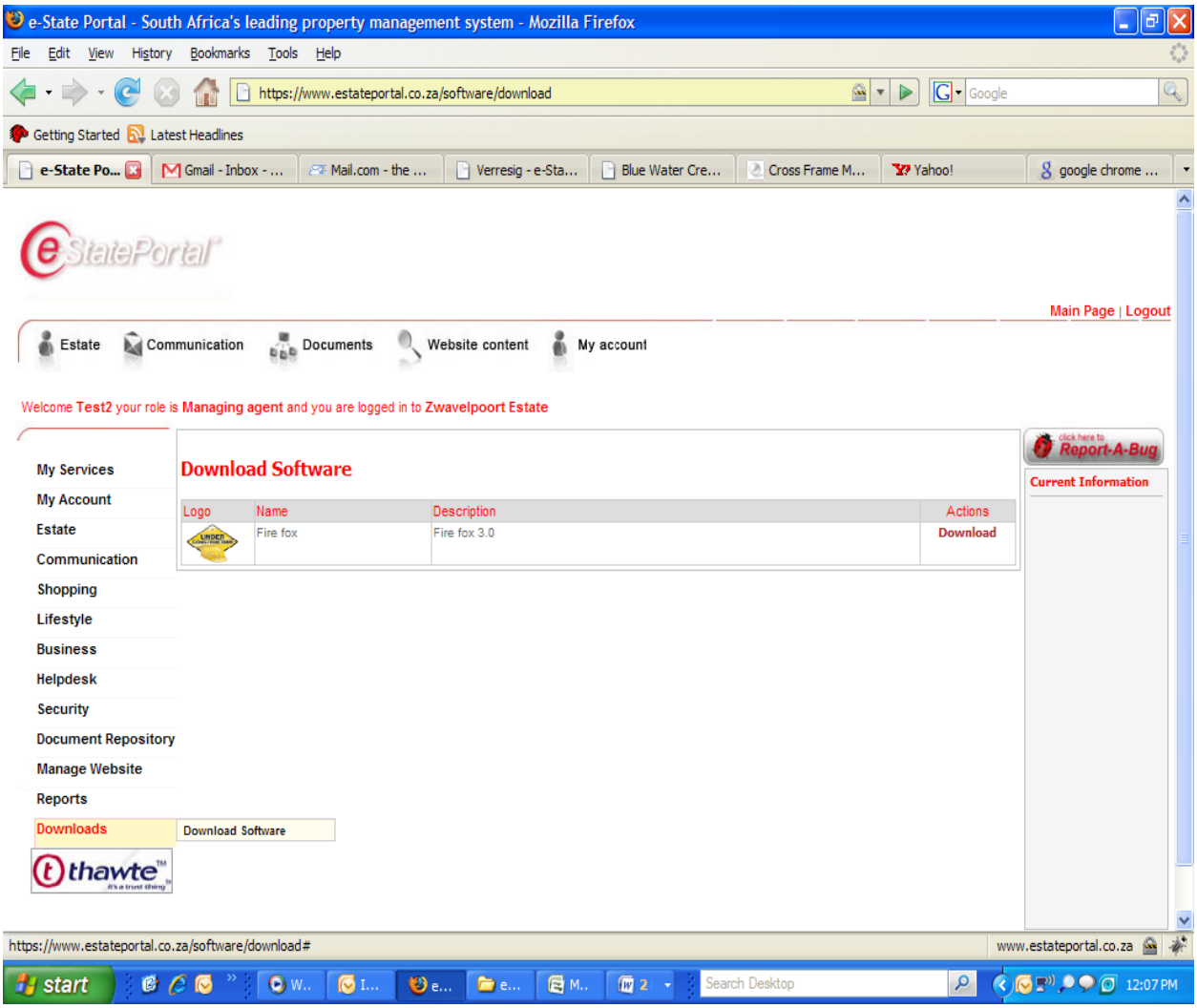
## How to “add more services”?

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Business menu. |
| 2 | Select “View Business Profile” option from the sub menu list. |
| 3 | Click “Add More Services” option at the top menu of view business profile page. |
| 4 | Select estate from the estate drop down list. |
| 5 | Select “Edit album name” from the top list. |
| 6 | Click “Apply Services” to submit the information. |

**How to “activate services”?**

| *Steps* | *Actions* |
|---|---|
| 1 | Go to Business menu. |
| 2 | Select “View Business Profile” option from the sub menu list. |
| 3 | Click “Manage Service” next to the service you want to activate. |
| 4 | Enter the service price. |
| 5 | Click “Update Service” to activate the service. |

## 1.9. Downloads.



## How to “Download downloadable software”?

| ***Steps*** | ***Actions*** |
|---|---|
| 1 | Make sure that you are already login into the system |
| 2 | Select estate from “estate quick login”. |
| 3 | Select “downloads” menu from menu list. |
| 4 | Select “download software” sub menu. |
| 5 | Click “download next to the software name you want to download”. |